Michael Greer's PM Resources

To: PM Basics Workshop Proposal Recipient

From: Michael Greer

Subject: **20 Key PM Actions & Results**

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Greetings!

The following 2 pages present my 20 Key PM Actions & Results, upon which my book and training are based. Note that these are not consultant-specific, idiosyncratic items, but rather are derived from the Project Management Institute's PMBOK (Project Management Body of Knowledge). During their construction, they were reviewed and revised by people from many different industries, so they are nearly universal in their applicability.

Michael Greer

Summary of Key Project Manager Actions & Results

Below is a list of Actions which project managers should take in order to successfully complete a project. Beside each Action is a description of one or more results that the Action should produce. (This is a high-level summary only. For detailed worksheets ,etc. to help complete each Action, please see *The Project Manager's Partner.* Note: Michael Greer's two-day workshop ***Project Management Basics*** provides hands-on practice in performing most of these activities. For information, contact Greer at (530) 688-6613 or e-mail: info@michaelgreer.com or visit http://www.michaelgreer.com)

Action	*Results of Successful Performance*
Initiating	
1. **Demonstrate Project Need and Feasibility**	• A document confirming that there is a need for the project deliverables and describing, in broad terms: the deliverables, means of creating the deliverables, costs of creating and implementing the deliverables, benefits to be obtained by implementing the deliverables.
2. **Obtain Project Authorization**	• A "go/no go" decision is made by the sponsor. • A project manager is assigned. • A "project charter" is created which: ▪ Formally recognizes the project ▪ Is issued by a manager external to the project and at a high enough organizational level so that he or she can meet project needs ▪ Authorizes the project manager to apply resources to project activities
3. **Obtain Authorization for the Phase**	• A "go/no go" decision is made by the sponsor which authorizes the project manager to apply organizational resources to the activities of a particular phase • Written approval of the phase is created which ▪ Formally recognizes the existence of the phase ▪ Is issued by a manager external to the project and at a high enough organizational level so that he or she can meet project needs
Planning	
4. **Describe Project Scope**	• Statement of project scope • Scope management plan • Work breakdown structure
5. **Define and Sequence Project Activities**	• An activity list (list of all activities that will be performed on the project) • Updates to the work breakdown structure (WBS) • A project network diagram
6. **Estimate Durations for Activities and Resources Required**	• Estimate of durations (time required) for each activity and assumptions related to each estimate • Statement of resource requirements • Updates to activity list
7. **Develop a Project Schedule**	• Project schedule in the form of Gantt charts, network diagrams, milestone charts, or text tables • Supporting details, such as resource usage over time, cash flow projections, order/delivery schedules, etc.
8. **Estimate Costs**	• Cost estimates for completing each activity • Supporting detail, including assumptions and constraints • Cost management plan describing how cost variances will be handled.
9. **Build a Budget and Spending Plan**	• A cost baseline or time-phased budget for measuring/monitoring costs • A spending plan, telling how much will be spent on what resources at what time
10. **(Optional) Create a Formal Quality Plan**	• Quality management plan, including operational definitions • Quality verification checklists

11.	**(Optional) Create a Formal Project Communications Plan**	• A communication management plan, including: ▪ Collection structure ▪ Distribution structure ▪ Description of information to be disseminated ▪ Schedules listing when information will be produced. ▪ A method for updating the communications plan
12.	**Organize and Acquire Staff**	• Role and responsibility assignments • Staffing plan • Organizational chart with detail as appropriate • Project staff • Project team directory
13.	**(Optional) Identify Risks and Plan to Respond**	• A document describing potential risks, including their sources, symptoms, and ways to address them
14.	**(Optional) Plan for and Acquire Outside Resources**	• Procurement management plan describing how contractors will be obtained • Statement of work (SOW) or statement of requirements (SOR) describing the item (product or service) to be procured • Bid documents, such as RFP (request for proposal), IFB (invitation for bid),etc. • Evaluation criteria -- means of scoring contractor's proposals • Contract with one or more suppliers of goods or services
15.	**Organize the Project Plan**	• A comprehensive project plan that pulls together all the outputs of the preceding project planning activities.
16.	**Close out the Project Planning Phase**	• A project plan that has been approved, in writing, by the sponsor • A "green light" or okay to begin work on the project
17.	**Revisit the Project Plan and Replan If Needed**	• Confidence that the detailed plans to execute a particular phase are still accurate and will effectively achieve results as planned.
	Executing	
18.	**Execute Project Activities**	• Work results (deliverables) are created • Change requests (i.e., based on expanded or contracted project) are identified. • Periodic progress reports are created. • Team performance is assessed, guided, and improved if needed • Bids/proposals for deliverables are solicited, contractors (suppliers) are chosen, and contracts are established. • Contracts are administered to achieve desired work results
	Controlling	
19.	**Control Project Activities**	• Decision to accept inspected deliverables • Corrective actions such as rework of deliverables, adjustments to work process, etc. • Updates to project plan and scope • List of lessons learned • Improved quality • Completed evaluation checklists (if applicable)
	Closing	
20.	**Close Out Project Activities**	• Formal acceptance, documented in writing, that the sponsor has accepted the product of this phase or activity. • Formal acceptance of contractor work products and updates to the contractor's files. • Updated project records prepared for archiving. • A plan for follow-up and/or hand-off of work products